

**Position Title:** Chief, Benefit Services Division

**Department:** PUBLIC EMPLOYEES RETIREMENT SYSTEM

**Final Filing Date:** Friday, June 29, 2012

**Bulletin ID:** 06142012\_4

The Above-Named Examination Bulletin is Amended as Follows:

**CORRECTION UNDER "FILING INSTRUCTIONS" - ALL APPLICATION MATERIALS ARE DUE BY 5:00 PM, JUNE 29, 2012.**



## PUBLIC EMPLOYEES RETIREMENT SYSTEM CAREER EXECUTIVE ASSIGNMENT EXAMINATION ANNOUNCEMENT

California State Government supports equal opportunity to all regardless of race, color, creed, national origin, ancestry, sex, marital status, disability, religious or political affiliation, age, sexual orientation, medical condition or pregnancy. It is an objective of the State of California to achieve a drug-free work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the State, the rules governing Civil Service, and the special trust placed in public servants.

<b>DEPARTMENT:</b>	PUBLIC EMPLOYEES RETIREMENT SYSTEM	<b>RELEASE DATE:</b>	Thursday, June 14, 2012
<b>POSITION TITLE:</b>	Chief, Benefit Services Division	<b>FINAL FILING DATE:</b>	Friday, June 29, 2012
<b>CEA LEVEL:</b>	CEA 2	<b>EXTENDED FINAL FILING DATE:</b>	
<b>SALARY RANGE:</b>	\$ 7,815.00 - \$ 8,616.00 / Month	<b>BULLETIN ID:</b>	06142012_4

### POSITION DESCRIPTION

**NOTE: CalPERS offers a performance award program with the ability to earn an award up to 15% of base pay**

### BACKGROUND:

CalPERS is the largest public pension fund in the United States with a current investment portfolio of over \$226 billion. It serves approximately 1.6 million active members, retirees, survivors and beneficiaries through its retirement and health benefit programs, and pays over \$14.2 billion in retirement benefits annually. The membership in CalPERS' retirement program is comprised of roughly one-third State employees, one-third employees of local public agencies that contract with CalPERS for retirement benefits, and one-third classified school employees. In addition to the well-known retirement program, CalPERS administers a health program that serves over 1.3 million members. The Benefit Services Division provides benefits and information to members, retirees, beneficiaries and survivors. Services include eligibility for and calculation of service and disability retirements, pre and post retirement death benefits, refunds and adjustments. In addition, this division ensures continuation of health benefits coverage for entitled retiring members and eligible survivors and beneficiaries. Other services provided to retired members include processing the monthly payment roll, making adjustments to benefit payments, conducting annual tax reporting, processing reinstatements and other post retirement employment issues. Monthly benefit payments exceed \$1.25 billion to approximately 548,000 annuitants.

### DUTIES/RESPONSIBILITIES:

Under the direction of the Deputy Executive Officer, Customer Services & Support (CSS), the Chief is responsible for the overall administration of the Benefit Services Division (BNSD). In addition,

the incumbent provides strategy and policy guidance to the Executive Staff and Board of Administration on a broad spectrum of retirement and benefit issues. This position also plays a pivotal role in the implementation of the CalPERS Strategic Plan and has a major role in the formulation of departmental policies, planning, and program implementation on all issues involving retirement plans, programs, and services. Finally, as part of CalPERS senior management, the Chief is responsible for providing program and policy direction, and carrying out the Strategic Plan.

### **MINIMUM QUALIFICATIONS**

Applicants must meet the following minimum qualifications:

#### **Either I**

Must be a State civil service employee with permanent civil service status or who previously had permanent status in the State civil service.

#### **Or II**

Must be a current or former employee of the Legislature, with two or more consecutive years as defined in Government code § 18990.

#### **Or III**

Must be a current or former non-elected exempt employee of the Executive Branch with two or more consecutive years (excluding those positions for which salaries are set by statute) as defined in Government Code § 18992.

#### **Or IV**

Must be a person retired from the United States military, honorably discharged from active military duty with a service-connected disability, or honorably discharged from active duty as defined in Government Code § 18991.

### **KNOWLEDGE AND ABILITIES**

Applicants must demonstrate the ability to perform high administrative and policy – influencing functions effectively. Such overall ability requires possession of most of the following more specific knowledge and abilities:

- (1) Knowledge of the organization and functions of California State Government including the organization and practices of the Legislature and the Executive Branch; principles, practices, and trends of public administration, organization, and management; techniques of organizing and motivating groups; program development and evaluation; methods of administrative problem solving; principles and practices of policy formulation and development; and personnel management techniques; the department's or agency's Equal Employment Opportunity Program objectives; and a manager's role in the Equal Employment Opportunity Program.
- (2) Ability to plan, organize, and direct the work of multidisciplinary professional and administrative staff; analyze administrative policies, organization, procedures and practices; integrate the activities of a diverse program to attain common goals; gain the confidence and support of top level administrators and advise them on a wide range of administrative matters; develop cooperative working relationships with representatives of all levels of government, the public, and the Legislature and Executive branches;

analyze complex problems and recommend effective courses of action; and prepare and review reports; and effectively contribute to the department's or agency's Equal Employment Opportunity objectives.

These knowledge and abilities are expected to be obtained from the following kinds of experience with substantial participation in the formulation, operation and/or evaluation of program policies (experience may have been paid or volunteer; in State service, other government settings, or in a private organization):

**CEA Level 1.** Supervisory/administrative experience in a line or staff activity, including the execution and/or evaluation of program policies.

**CEA Levels 2 and 3.** Broad administrative or program manager experience with substantial participation in the formulation, operation, and/or evaluation of program policies.

**CEA Levels 4 and 5.** Extensive managerial and program administrative experience which has included substantial responsibility for a combination of management functions such as program planning; policy formulation; organization coordination and control; and fiscal and personnel management. Where high technical professional qualifications are of primary importance in performing the duties of a given CEA position, then the above required experience may have been in a staff capacity exercising professional skills to influence and contribute to program, policy, and methods of providing those professional services. Primary examples are medical doctors and attorneys.

### **DESIRABLE QUALIFICATION(S)**

1. Strong leadership skills and a demonstrated ability to think strategically and function effectively as a member of a top management team.
2. Strong management skills demonstrated by experience in an administrative or executive capacity with responsibility for policy development and program administration.
3. Organizational skills and a demonstrated ability to monitor workloads and accomplish stated objectives in an operations or production environment.
4. Demonstrated knowledge of information technology tools that can improve the efficiency and effectiveness of program operations.
5. Knowledge of the relationship between workers' compensation providers and CalPERS relative to disability entitlement.
6. Demonstrated communication and negotiating skills and experience presenting issues before a wide range of audiences including a board or similar body.
7. Knowledge of the California Public Employees' Retirement System's organization, goals, functions, and policies.
8. Experience in an administrative or executive capacity, at least equivalent to Staff Services Manager III, with responsibility for planning and administering a complex benefits program.

### **EXAMINATION INFORMATION**

A minimum rating of 70% must be attained to obtain list eligibility. Hiring interviews may be conducted with the most qualified candidates. All candidates will receive written notification of their examination results. The result of this examination will be used only to fill the position of **Chief, Benefit Services Division**, with the **PUBLIC EMPLOYEES RETIREMENT SYSTEM**. Applications will be retained for twelve months.

*The Results of this examination will be used only to fill this position and may be used to fill subsequent vacancies for this position for a period of up to twelve months.*

The examination process will consist of an evaluation of the candidate's application and Statement of Qualifications (SOQ). The minimum and desirable qualifications listed on this bulletin will be used to screen and evaluate the application and SOQ, therefore, it is critical that each applicant include specific information on how his/her background, knowledge, abilities and personal characteristics meet the minimum qualifications and desirable qualifications. The SOQ may also serve as documentation of the candidate's ability to present information clearly and concisely in writing, since this is a critical factor to successful job performance. The SOQ may be the only basis for the candidate's final score and rank on the eligible list. Candidates will be ranked competitively, and each candidate will be notified in writing of his/her examination results.

## **FILING INSTRUCTIONS**

Address for hand-delivery: Human Resources Division 400 P Street, North Bldg., Room 3260 Sacramento, CA

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All application materials (Standard State Application, Resume, Statement of Qualifications and References) must be received by the CalPERS Human Resource Office by 5:00 PM, June 15, 2012. Application materials personally delivered, received via U.S. Postal Service, or any other delivery service after 5:00 PM on the final filing date will not be accepted. Questions concerning this examination should be directed to Alda Ferreira at (916) 795-0426.

### **Interested applicants must submit:**

- A completed Standard State Application (Form 678).
- A "Statement of Qualifications". The Statement is a narrative discussion of how the candidate's education, training, experience, and skills meet the minimum and desirable qualifications and qualify them for the position. The Statement of Qualifications serves as a documentation of each candidate's ability to present information clearly and concisely in writing and should be typed and no more than two pages in length.
- Resumes do not take the place of the Statement of Qualifications.
- Resume must be included with application
- Statement of Qualifications should specifically address each of the Desirable Qualifications
- Please include the names and telephone numbers of at least two references

### **Applications must be submitted by the final filing date to:**

PUBLIC EMPLOYEES RETIREMENT SYSTEM, Human Resources Division  
400 Q Street, Lincoln Plaza North, Room 3260, Sacramento, CA 95811  
Alda Ferreira | 916-795-0426 | alda\_ferreira@calpers.ca.gov

## **SPECIAL TESTING**

If you have a disability and need special testing arrangements, mark the appropriate box in Part 2 of the "Examination Application." You will be contacted to make specific arrangements.

### **GENERAL INFORMATION**

If you meet the requirements stated in this bulletin, you may take this examination, which is competitive. Possession of the entrance requirements does not assure a place on the eligible list. Your performance in the examination described on this bulletin will be compared with the performance of others who take this test, and all candidates who pass will be ranked according to their scores.

The PUBLIC EMPLOYEES RETIREMENT SYSTEM reserves the right to revise the examination plan to better meet the needs of the service if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service law and rules and all competitors will be notified.

**General Qualifications:** Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others.

**Class specs:** <http://www.dpa.ca.gov/textdocs/specs/s7/s7500.txt>